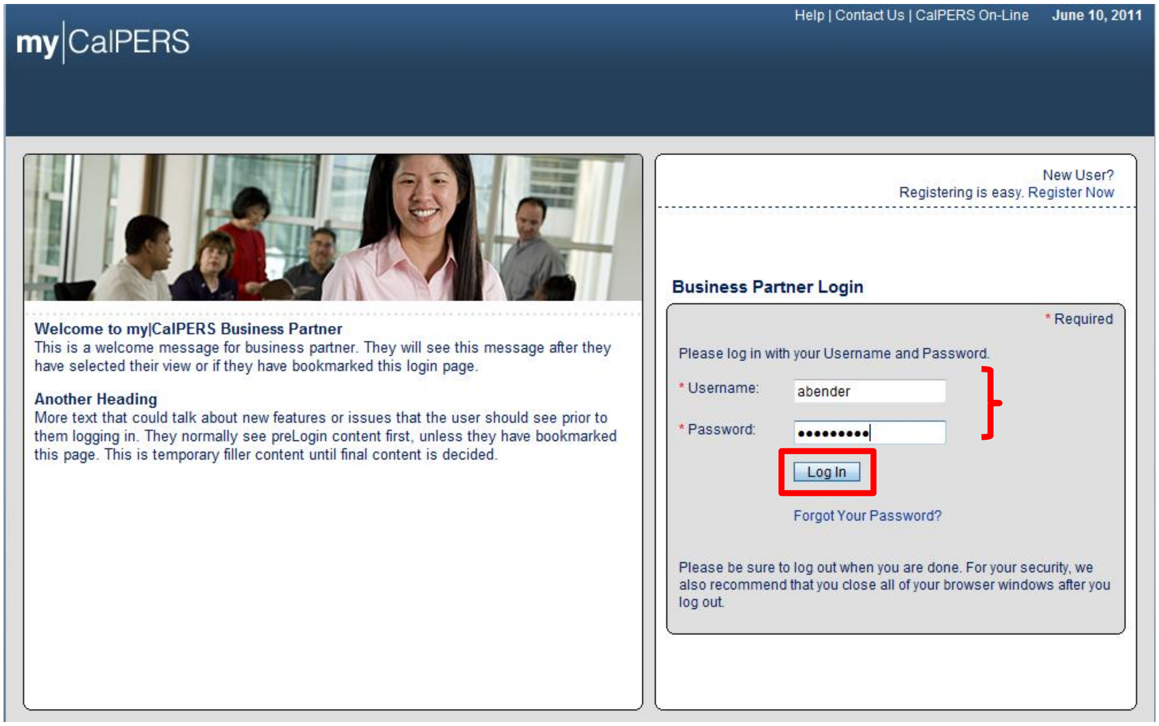
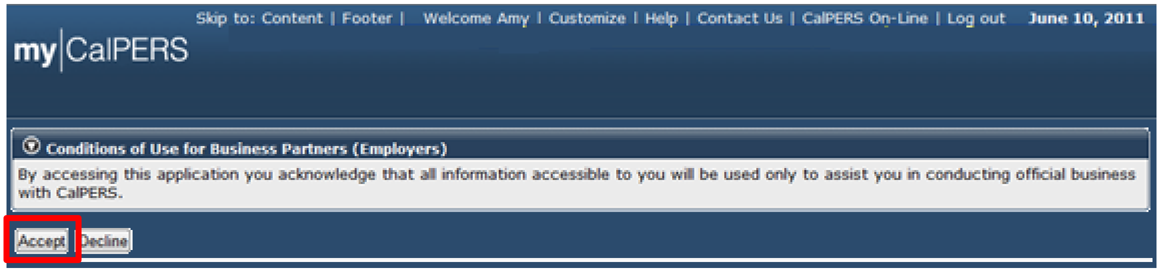
PUBLIC EMPLOYER READINESS TEAM

my|CalPERS Guide to Adding New Contacts

1. Enter your Username and Password. Select **Log In**.



2. *Conditions of Use* page displays. Select **Accept**.

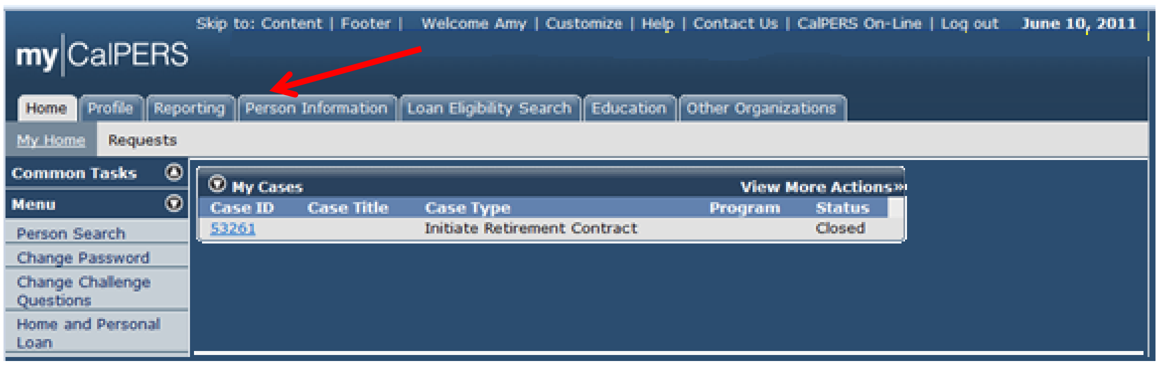


3. The *My Home* page displays.

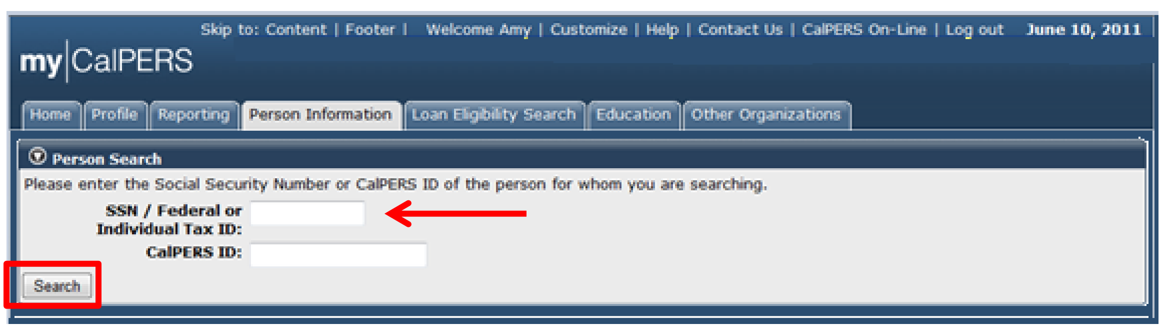
   Before you can add a contact, you need to have the contact's CalPERS ID or their Social Security number and birthdate.

   If you have the CalPERS ID of the contact, skip to **step 6**.

   If the person is an employee of your organization and a CalPERS member, you can look up the Person Information for the contact to retrieve their CalPERS ID. Select the **Person Information** tab.

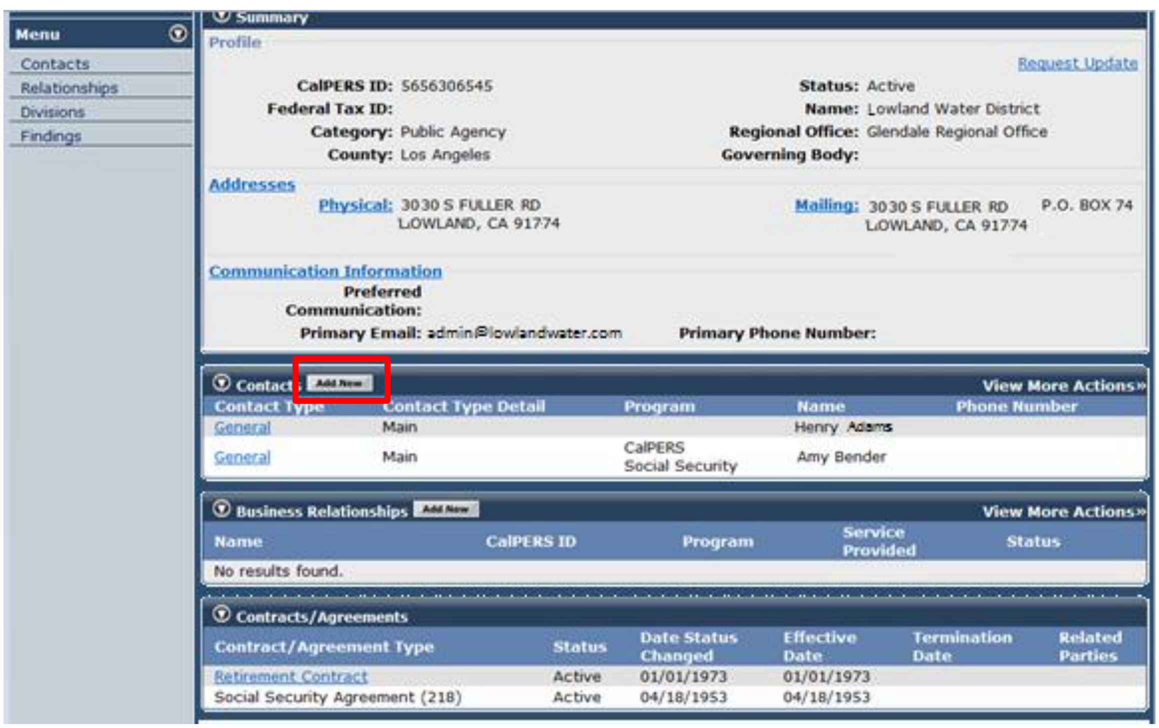


4. The *Person Information* page displays. Enter the SSN of the contact and select **Search**.

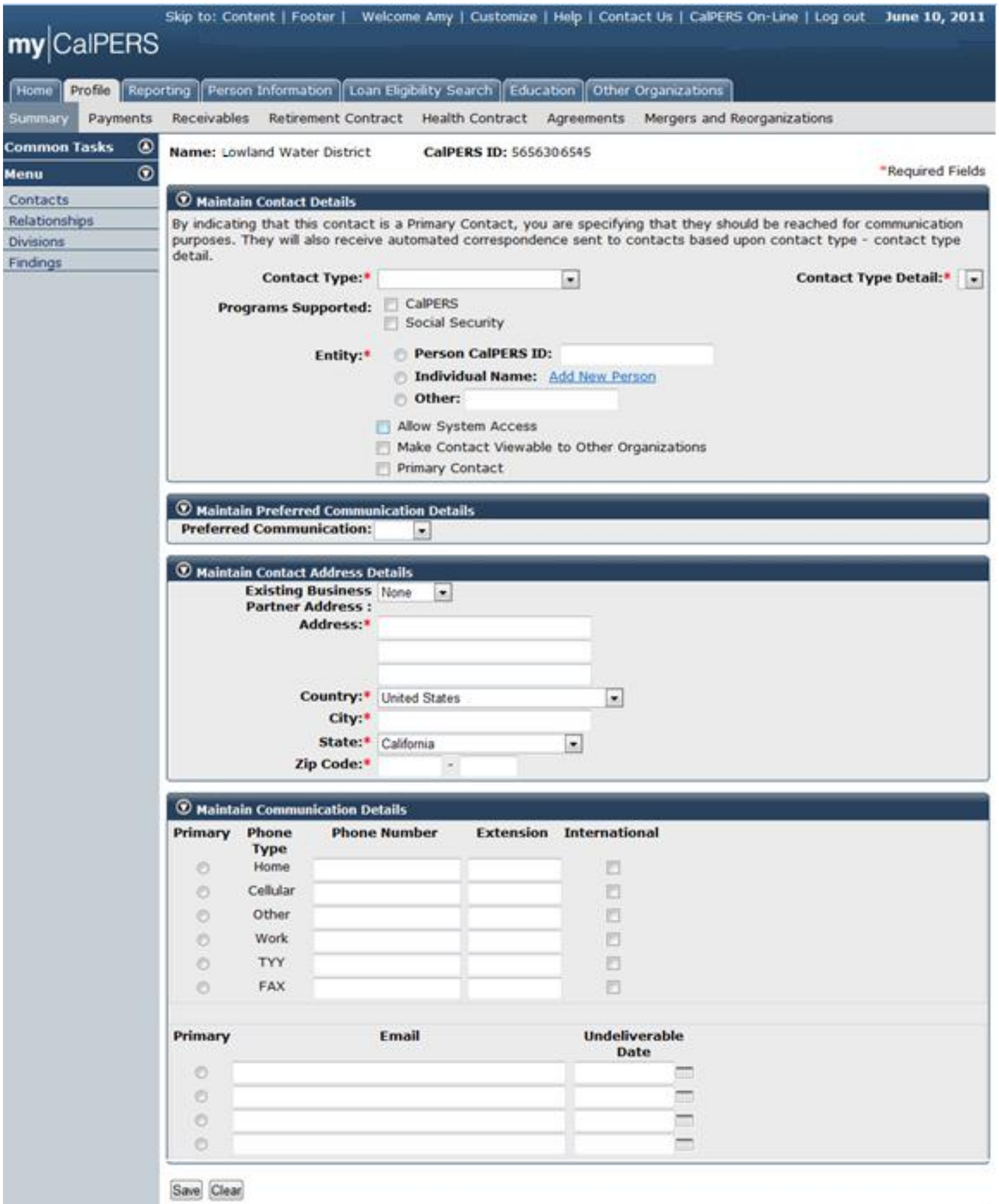


5. The *Summary* page displays. You will see the **CalPERS ID** of the individual. Make note of the **CalPERS ID**. Select the **Profile** tab.

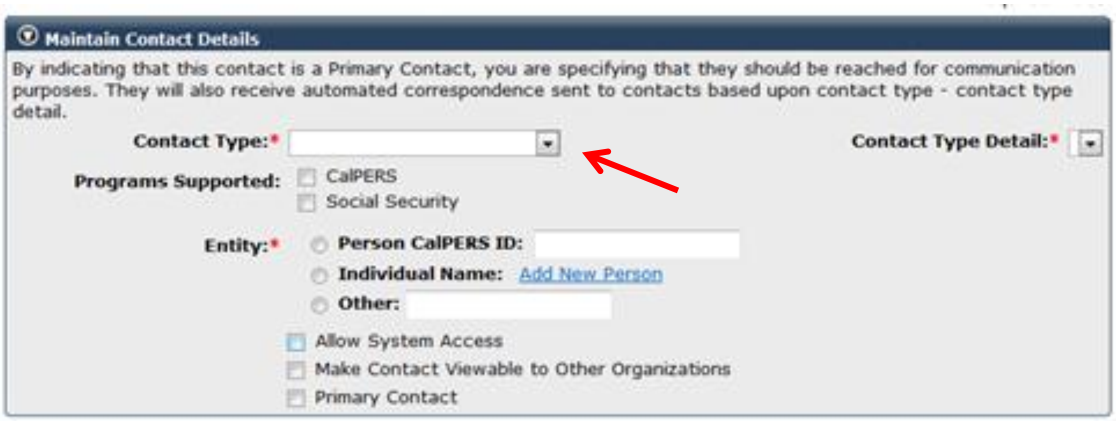
6. The *Business Partner Profile* page displays. Select **Add New** on the Contacts section of the page.



7. The *Contacts Detail* page displays. This is a view of the entire page. Steps to complete each panel on the page begin with Step 8.



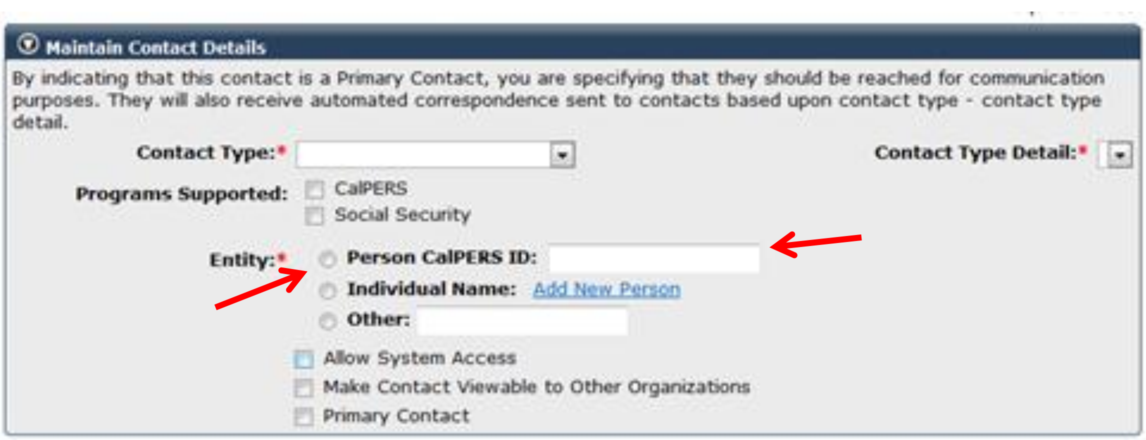
8. In the Maintain Contact Details section:
    a. Select the appropriate contact type from the **Contact Type** dropdown.



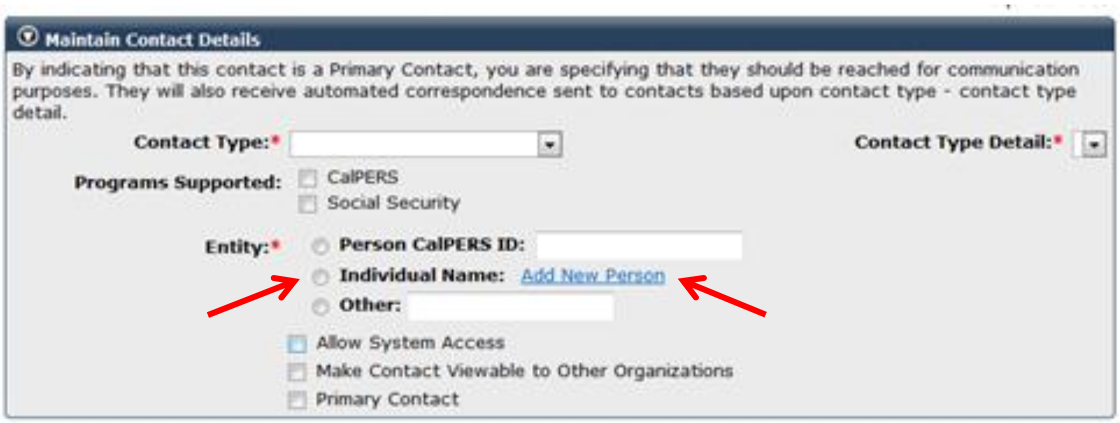
    b. Select the appropriate contact type detail from the **Contact Type Detail** dropdown.

c. Select the appropriate checkboxes for **Programs Supported**.

d. If you know the CalPERS ID of the contact, select the Person CalPERS ID radio button and enter the CalPERS ID of the participant. Skip to **step 8i**.

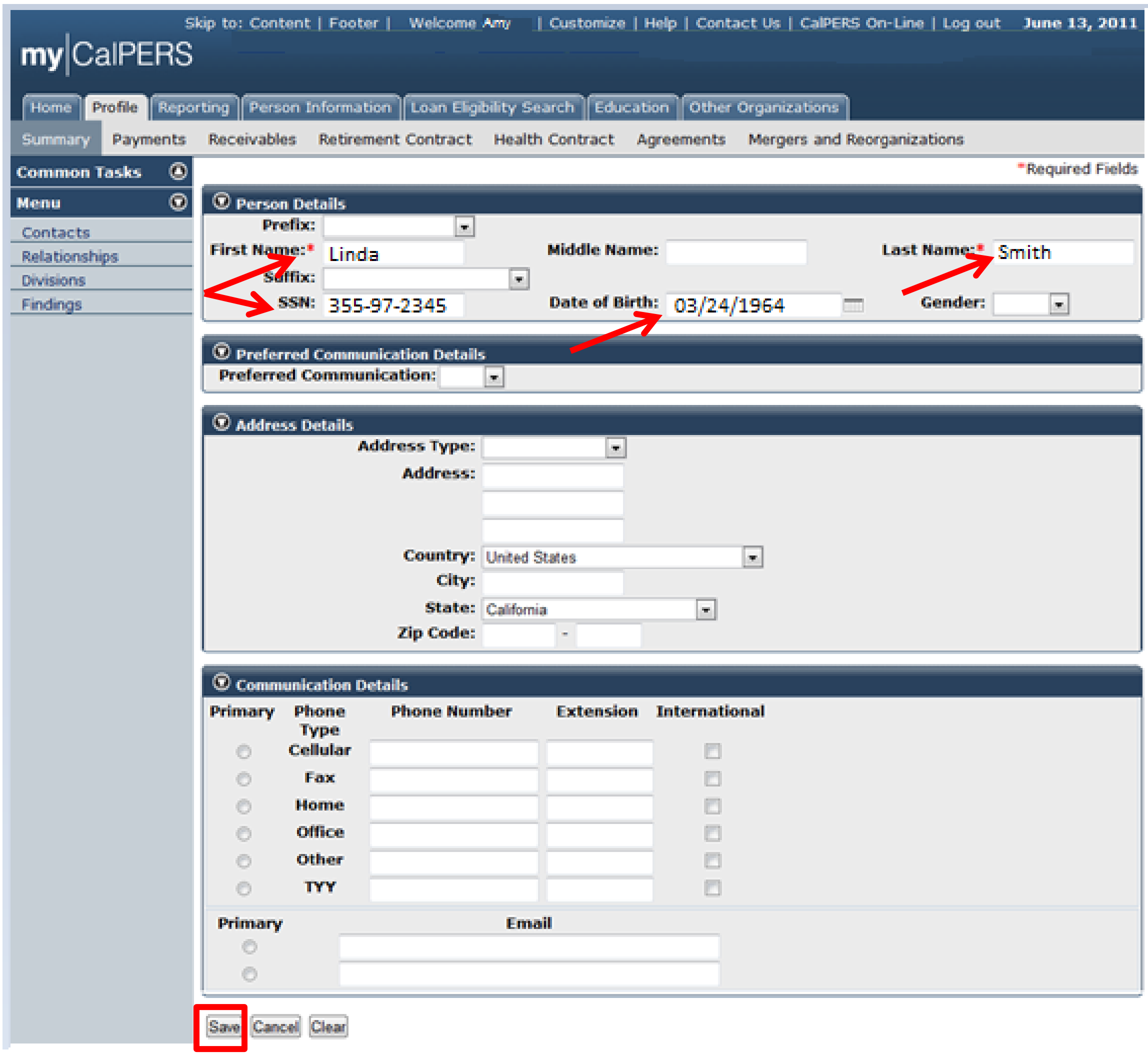


f. Select the **Individual Name** radio button. Select **Add New Person**.

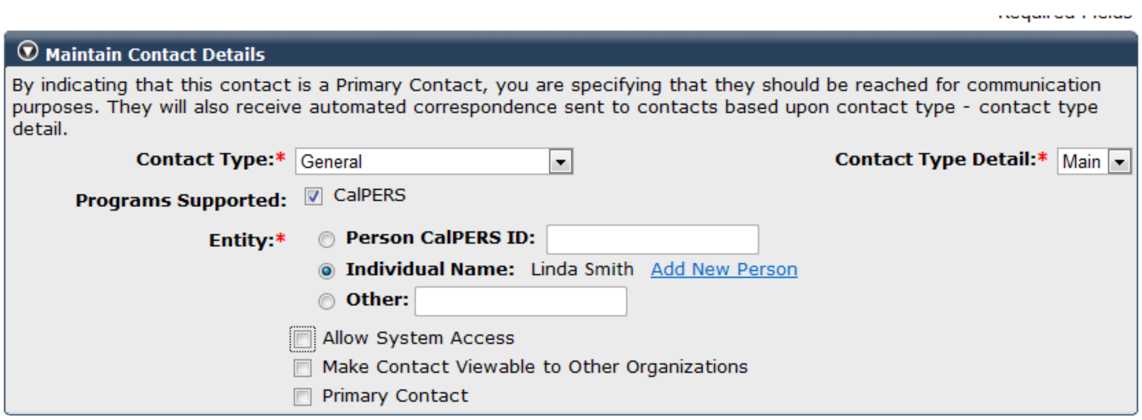


g. The *Person Details* page displays. Enter the **First Name**, **Last Name**, **SSN** and **Date of Birth** of the contact. Select **Save.**

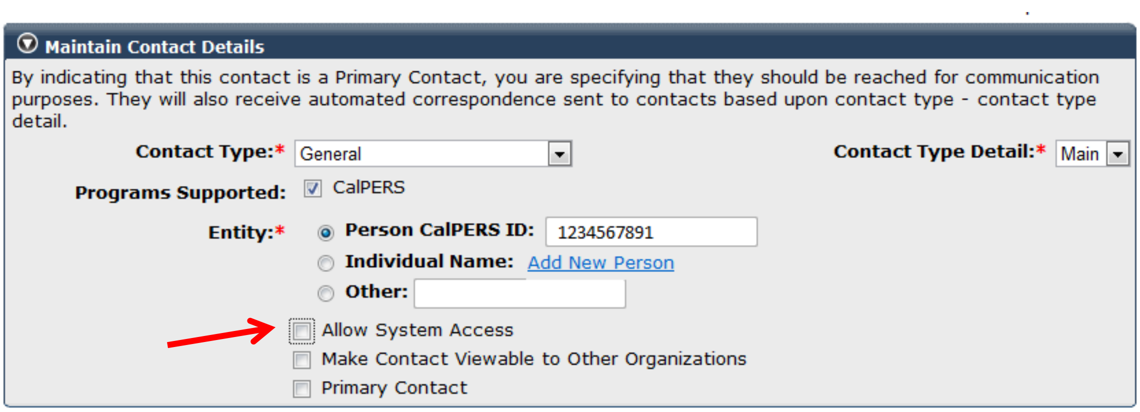
If the individual exists and has a CalPERS ID, matching on First and Last name, SSN and Birthdate will associate this new contact with the existing CalPERS ID for the individual.



h. The *Contact Details* page displays with the name of the person assigned to the contact

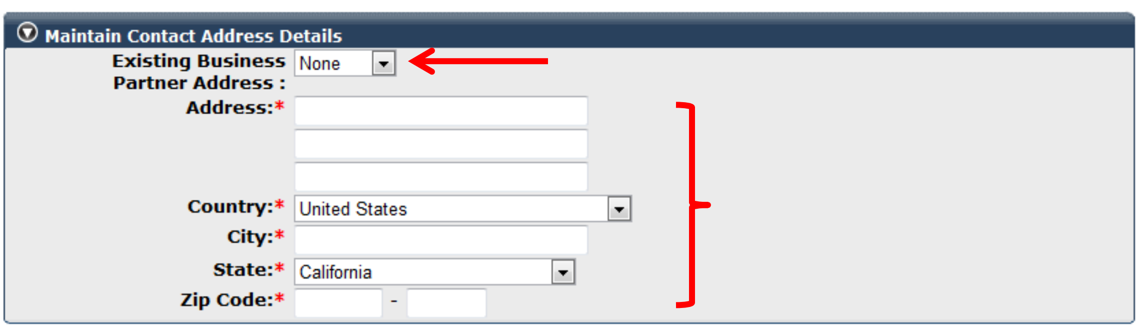


i. Select the checkbox next to **Allow System Access**. If appropriate, also select the checkbox for **Make Contact Viewable to Other Organizations** and **Primary Contact**.



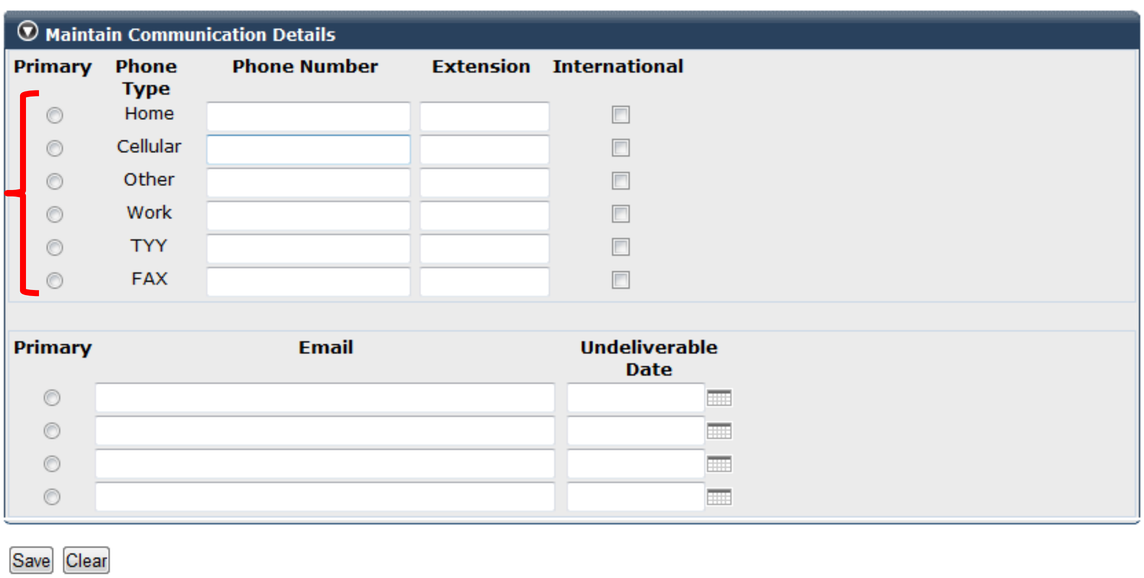
j. In the Maintain Preferred Communication Details section, select the **Preferred Communication** method from the dropdown.

k. In the Maintain Contact Address Details section, select the appropriate value from the **Existing Business Partner Address** dropdown if the business address is used for the contact. Otherwise, enter the Address, City, State and ZIP Code.

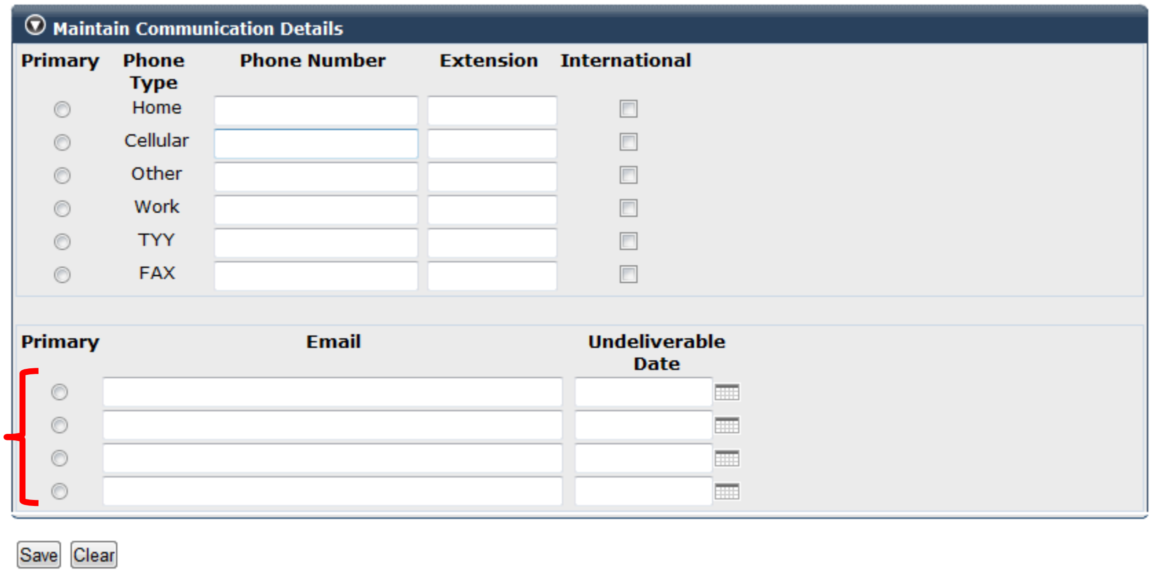


l. In the Maintain Communication Details section:

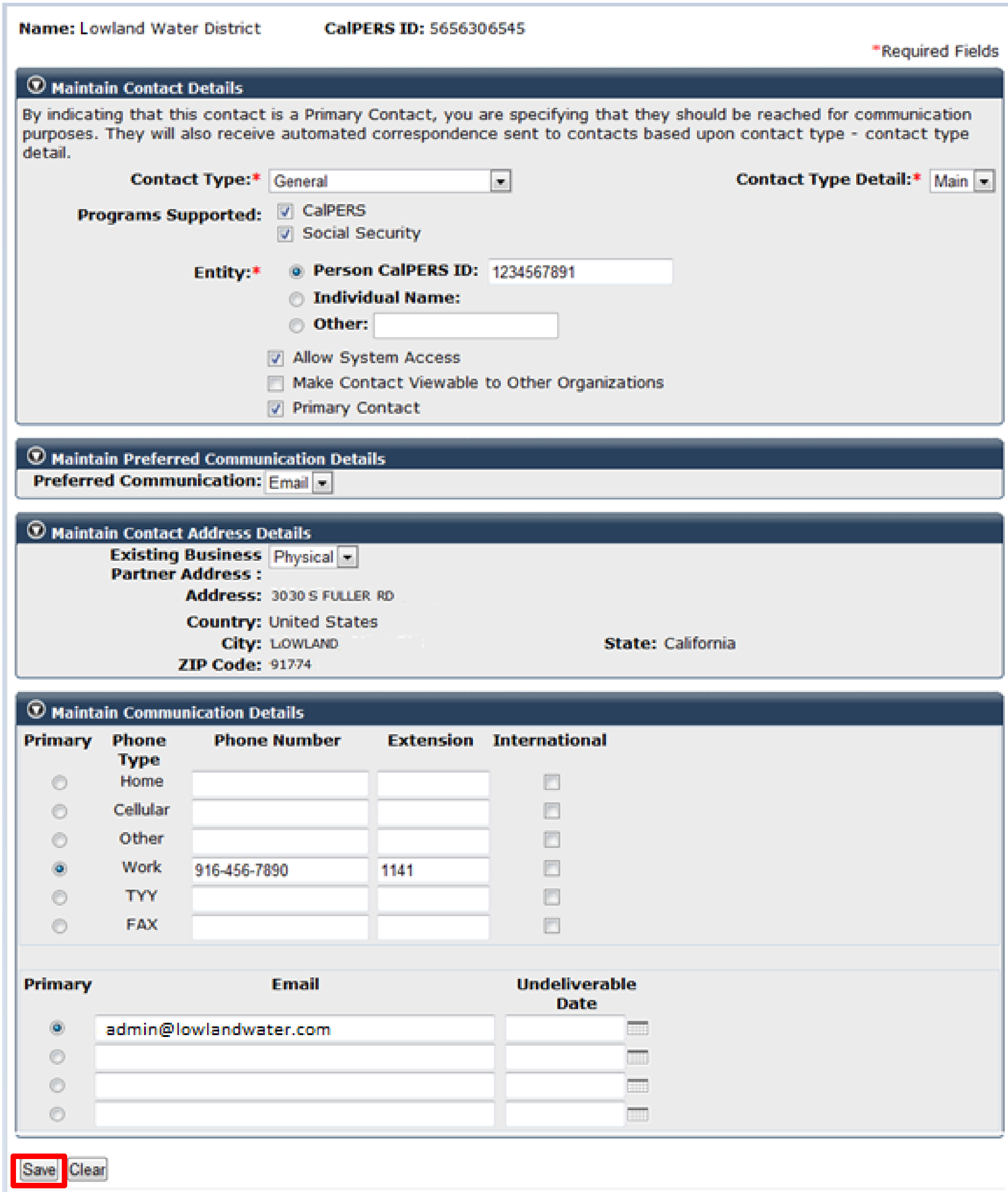
i. Select the radio button for the **Primary** phone type and enter the phone number and extension. Use the checkbox to indicate if it is an **International** number.



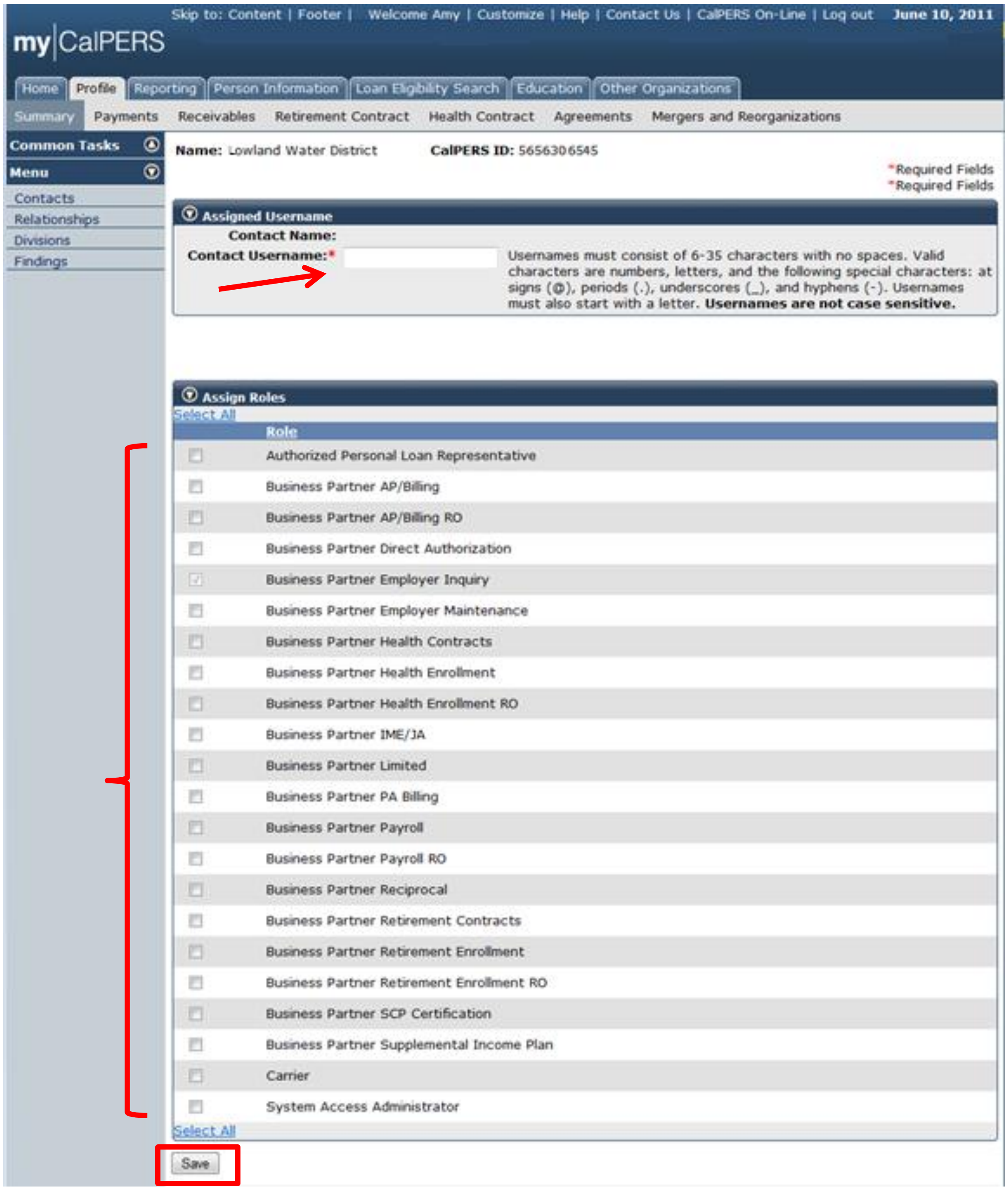
ii. Select the radio button for the **Primary** email type and enter the email address.


Maintain Communication Details
Primary
Phone Type
Phone Number
Extension
International
Home
Cellular
Other
Work
TYY
FAX
Primary
Email
Undeliverable Date
Save
Clear

9. Here is how the page might look when completed. Select **Save**.

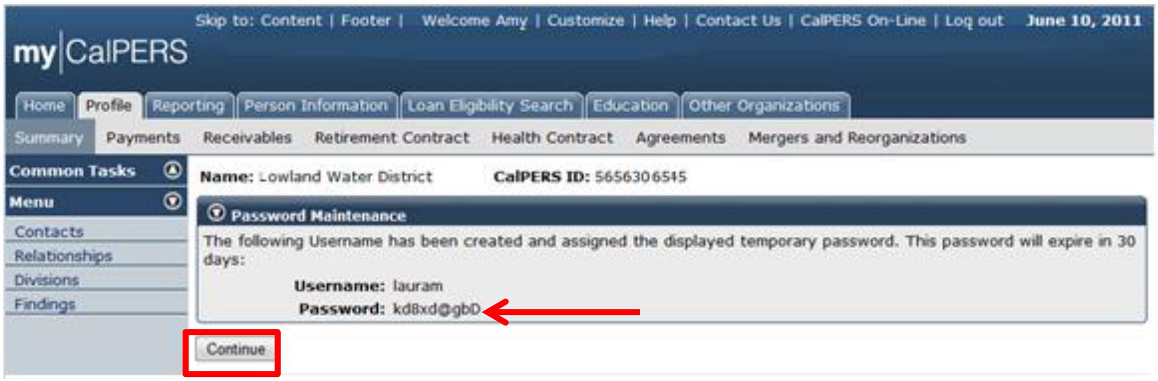


10. The *System Access* page displays. Enter the **Contact Username** and select the appropriate checkboxes in the Assign Roles section. Select **Save**.



11. The *Password Maintenance* page displays. The username just created is assigned a temporary password.

    Be sure to capture this username and temporary password. It is the only time the temporary password will be available. Select **Continue**.



12. The contact has been added and now displays in the **Contacts** list.

13. Provide the username and temporary password to the contact so they can log in to establish their new password and responses to security questions.

System Support Contacts

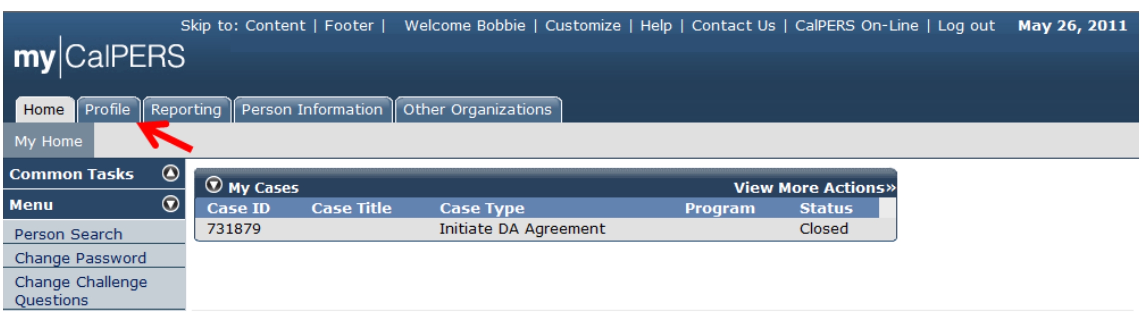
To ensure that email notifications are sent to the appropriate contact when files are ready for pick up, please create a System Support contact in your Business Partner profile.

Files for pickup include:

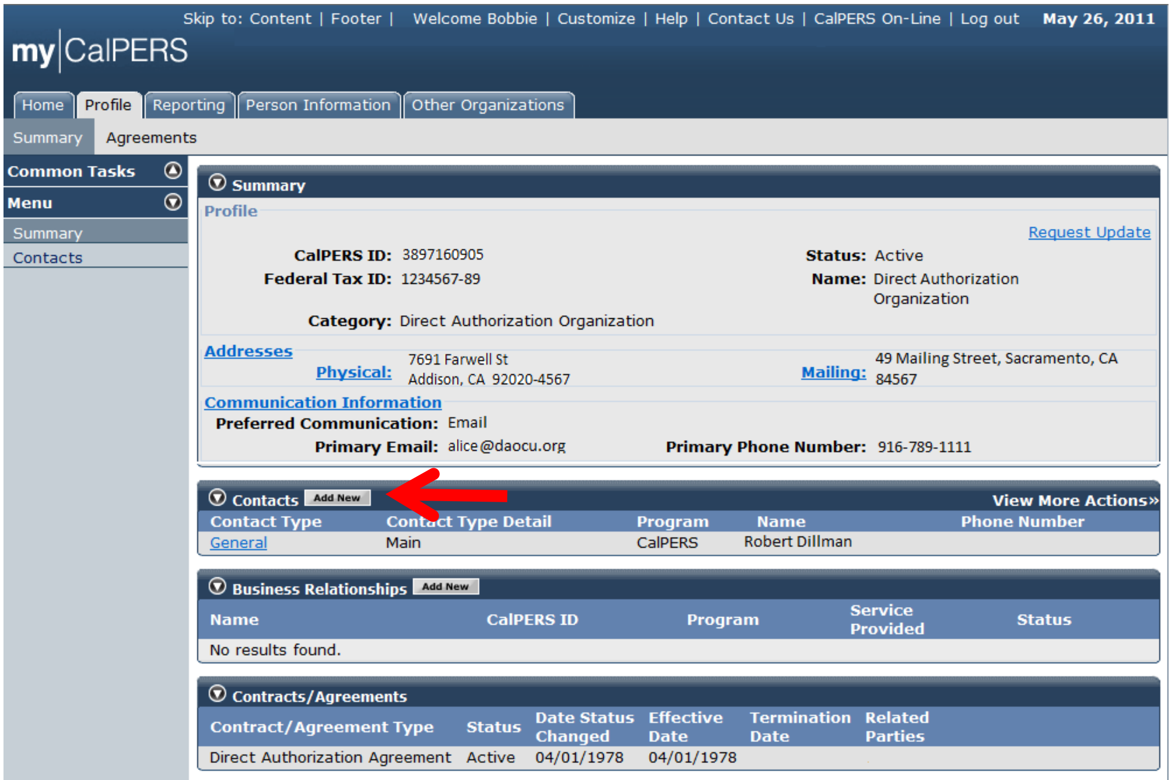
- Response files for payroll contribution, retirement enrollment, or health enrollment transactions sent via FTP
- Response files for deduction request transactions sent via FTP
- Deduction registers

Setting up a contact to receive notification for file processing status is very similar to adding any other contact, but there are some key values that need to be set for this to work correctly. These steps should be familiar to you, so this is a summary of the steps to add a contact highlighting the unique values that are required for the email notification of file status to work.

1. If you are the System Access Administrator, log in to my|CalPERS and select the **Profile** tab.



2. On the *Profile* page, select **Add New** in the Contacts panel.



3. On the *Contacts* page, select the **Contact Type** dropdown.

4. On the **Contact Type** dropdown, select **System Support**. The Contact Type for file processing status notification must be System Support.

5. Select **None** from the **Contact Type Detail** dropdown. Select the Entity appropriate for the contact.
    a. If the System Support contact is a CalPERS participant, select **Person CalPERS ID** and enter the CalPERS ID in the window.
    b. If the System Support contact is not a CalPERS participant, select the **Individual Name** radio button and complete the Person Details information, save it, and continue completing this page.
    c. The primary System Support contact will receive email notifications of file status. Select the **Primary Contact** checkbox.

6. Select **Email** from the **Preferred Communication** dropdown. To receive notification emails, the System Support contact must have Email selected as the Preferred Communication method.

7. Select the appropriate value from the **Existing Business** dropdown or complete the fields marked with a red asterisk in the Maintain Contact Address Details panel.

8. Select the radio button to indicate the primary email address and enter the address in the email window in the Maintain Contact Communication Details panel. The **Primary** radio button must be selected and the appropriate email address must be entered for the System Support contact to receive the file status notifications. Then select **Save**.